SYSTEM AND METHOD FOR AUTOMATING WORKFLOW MANAGEMENT AND TRACKING OF VOICEMAIL, TEXT AND MULTIMEDIA MESSAGES, LIVE CHATS, FORMS AND UPLOADED FILES

CROSS-REFERENCE TO RELATED APPLICATION

This application claims the benefit of U.S. provisional application No. 62/889,458 filed Aug. 20, 2019, the contents of which are incorporated herein by reference in their entirety.

BACKGROUND OF THE INVENTION

Tracking and responding to incoming communications received through a variety of different mechanisms and communication channels, such as a voicemail system, text or multimedia messaging app, social media app, live chat widget, online forms or files uploaded through an online portal, can be time consuming and labor intensive, as it requires access to and use of different systems, apps and tools, one at a time. The number of different types of communications used between businesses and organizations, and their clients, users and partners is growing over-time. For example, in the past much of communications were done through sending paper documents in envelopes, by fax, or email, by phone or in person. Yet in recent years it's becoming more common and more popular to use live chat, text messaging, social media messaging, and other text and multimedia messaging apps.

Manually consolidating and documenting all incoming communications into one Workflow Management System (WfM System), and manually updating the status on each of the items can be time consuming and labor intensive, requiring a person to spend extra time to copy, enter and update relevant information.

On the other hand, not tracking incoming communications may result in overlooking or missing an important message, or not responding or reviewing it in time, which in turn can impact client, customer or partner satisfaction, cause missed business opportunities, and potentially can damage the standing and brand image of an organization.

If several people are involved in monitoring and handling incoming communications, it may require some level of coordination and collaboration. Collaborating and coordinating about who will respond to a received voicemail and how, may not be trivial if the individual apps and systems (e.g., the voicemail app) do not provide a mechanism to add comments, manage status, exchange messages or document discussions. Using a different system—for example, an organization's Instant Messaging System (IM System)—to coordinate responses and activities to handle incoming communications, can make it difficult to track status and keep relevant information organized.

Instant messaging has become an essential part of the daily workflow for many companies. Current IM Systems offer a mechanism to have one-to-one or one-to-many chats, or to participate in chat rooms, channels or groups. Yet, the instant messaging tools typically are not integrated with other systems and tools, such as live chat, texting and multimedia messaging apps, voicemail systems, online forms, or upload portals.

Discussions about the communications received from External Parties between multiple team members in the IM System may require manually copying the content from the

received communications into the IM System, adding unnecessary time-consuming and labor-intensive efforts. The effort and time required to switch between different applications, for example, between voicemail app and the IM System, or between a live chat and the IM System, is not productive and could be error prone, slowing down the performance of a team or individuals.

SUMMARY OF THE INVENTION

In one aspect, there is disclosed herein a method and system for three-way integration of external communication mechanisms with an organization's Instant Messaging (IM) System and its Workflow Management (WfM) System, wherein the IM System comprises a Chat Room, the method and system comprising:

a) receiving and storing a communication containing content from an external party through a communication mechanism);

b) automatically generating a Collaboration Space within the IM System's Chat Room associated with the specific instance of the communication mechanism used to receive the communication;

c) automatically generating a message within the newly created Collaboration Space and populating it with the content and/or information about the content of the received communication; and

d) automatically generating and populating a record in the WfM System to track the status and progress of handling the received communication.

Non-limiting examples of such communications include voicemail, text messages, live chat, online forms, a portal for uploading files, and social media messaging.

In one optional embodiment, the Collaboration Space comprises a Chat Window, and an authorized user can use the Chat Window in the IM System to send and receive communications through interactive external communication mechanisms.

In an alternative optional embodiment, the Collaboration Space comprises a Chat Window, and an authorized user can use the Chat Window of the Collaboration Space in the IM System to access one-way incoming communications received from non-interactive external communication mechanisms

In another optional embodiment, an authorized user can use the Chat Window of the Collaboration Space in the IM system to coordinate and/or collaborate with others on addressing and handling received communications, and have private discussions not visible to external parties.

In another optional embodiment, the Collaboration Space comprises a Chat Window, and the Chat Window is configured to (A) document one or more of observations, status, findings, comments, outcomes, planned or needed action items while addressing or handling received communications and to (B) track execution of the action items.

In another optional embodiment, an authorized user can use the Chat Window of the Collaboration Space in the IM system to review and close-out the workflow required to address or handle received communications.

In another optional embodiment, the Collaboration Space comprises a Chat Window, and a record in the WfM System is automatically updated with one or more captured attributes (such as, for example, a date and time stamp, ID of the authorized user, and action performed by the authorized user, etc.) each time a new activity occurs in the corresponding Chat Window of the Collaboration Space. Such activities may include each time the Chat Window of the correspond-